

REMARKS

1. Applicants have amended the first paragraph of this application in accordance with the suggestions of the Examiner on page 3 of the Office Action dated 02/28/2006, to fulfill the requirements of 35 U.S.C. 120 and 37 C.F.R. 1.78.

2. Applicants have revised the claims in accordance with the suggestions of the Examiner. Applicants have also revised the claims to make the claims definite and to eliminate inconsistencies that applicants' attorney noted in the claims in preparing this amendment. As now written, the claims are believed to be definite.

3. The Examiner has cited as a separate reference, against a number of the claims including claims 6, 7, 8, 9, 10-12, 24, 25, 39 and 40-42, the Altman et al. pending application US2003/8120526 filed on October 16, 2002. Altman has a filing date of 10/16/2002. This is after applicants' filing date.

Altman filed provisional application 60/329,281 on October 16, 2001 in the USPTO. Applicants are enclosing a copy of the Altman provisional application. As the Examiner will note, the Altman provisional application does not provide a sufficient number of drawings or a sufficient specification to support the Altman non-provisional application. For example, there are at least ten (10) figures showing circuit diagrams and flow charts in the Altman non-provisional application. There are no circuit diagrams or flow charts in the Altman provisional application.

37 CFR 1.53(c) reads as follows:

"Application filing requirements – Provisional application.

*The filing date of a provisional application is the date on which a
specification as prescribed by the first paragraph of 35 U.S.C. 112, and*

any drawing required by §1.81(a) are filed in the Patent and Trademark Office. No amendment, other than to make the provisional application comply with the patent statute and all applicable regulations, may be made to the provisional application after the filing date of the provisional application."

In accordance with the provisions of 37 CFR 1.53(c), the Altman provisional application has no effect in establishing a filing date of the Altman non-provisional application since Altman filed the non-provisional application after 12/2/01, the filing date of this application. Because of this, the Examiner should withdraw the Altman non-provisional patent application as a prior art reference and should allow claims 6, 7, 8, 9, 10-12, 24, 25 and 40-42 over the other references cited by the Examiner.

4. Claims 26-29, 31, 33, 34 and 36 have been rejected under 35 U.S.C. 103(a) as being unpatentable over Iyengar patent 6,360,205. Claims 26-29, 31, 33, 34 and 36 are allowable over Iyengar for the following reasons.

a. Claim 26

In claim 26, applicants recite that the legacy transactions are performed simultaneously with the individual transactions and that the legacy transactions and the individual transactions are provided simultaneously. Applicants also recite that the legacy transactions and the individual transactions are displayed simultaneously on different portions of a display screen. Iyengar does not disclose this. Contrary to the position of the Examiner, Iyengar does not disclose, in (a) column 7, lines 48-60, (b) column 9, lines 40-43, (c) column 11, lines 30-34 and (d) column 16, lines 4-7, the steps of providing prices for the transactions at a processing station from a plurality of first sources at published prices for the transactions, and

providing for the transmission of the prices discounted from the established prices from the first sources to the processing station. Iyengar also doesn't disclose in column 16, lines 4-17 that the searches for the published and the discounted fares are performed simultaneously. There is also no disclosure by Iyengar in column 11, lines 30-35 that the published prices and the discounted prices are displayed simultaneously on a display screen. Because of the failure of Iyengar to disclose the features discussed above, claim 26 is allowable over Iyengar.

b. Claim 27

Claim 27 is dependent from allowable claim 26. Furthermore, Iyengar does not disclose, in (a) column 1, lines 56-61, (b) column 7, lines 49-61 (c) column 8, lines 6-9, (d) column 11, lines 30-55, (e) column 16, lines 4-17 and (f) column 3, lines 10-14, that the published prices for the transactions are provided in a first protocol, that the discounted prices for the transactions and the prices from other sources are provided in a second protocol and the first and second protocols are made compatible and that the published prices and the discounted prices in the compatible protocol are displayed simultaneously on the display server.

c. Claim 28

Claim 28 is dependent from allowable claim 26. Iyengar additionally does not disclose, in (a) column 6, lines 60-65, (b) column 7, lines 49-61, (c) column 8, lines 6-9, (d) column 16, lines 4-17 and (e) column 3, lines 10-14, the steps of providing prices for the transactions at the processing station from at least one second source offering published prices for the second source, the second source being different from the first source, providing for the transmission of the published prices from the at least one second source to the processing station and displaying the published prices from the at least one second source on the display server simultaneously with the display of the

published and discounted prices from the first source and the other sources and from the at least one second source in the display server simultaneously with the display of the published and discounted prices from the first source and the other sources. Because of this, claim 28 is allowable over Iyengar.

d. Claim 29

Claim 29 is dependent from allowable claim 28. Claim 29 is also allowable over Iyengar because of the recitations in claim 29. For example, Iyengar does not disclose that the published prices from the at least one second source is provided with a protocol different from the first and second protocols, that the fares from the first and second sources are searched simultaneously and that the fares are displayed simultaneously.

e. Claim 31

In analyzing claim 31, the Examiner has referred to Altman. Applicants are analyzing the Examiner's interpretation of the claim on the basis that the Examiner intended to refer to Iyengar.

The Examiner has not cited portions of Iyengar against claim 31. However, Examiner does not disclose any of the steps recited in claim 31.

f. Claim 32

Claim 32 is dependent from allowable claim 31. furthermore, the Examiner has admitted that Iyengar does not disclose the steps of providing a printer at the legacy server and printing, in the printer at the legacy server, a ticket providing for the

performance of the selected one of the legacy and individual transactions as the particular transaction.

The Examiner has indicated in column 14, lines 5-11, that a confirmation is sent to the legacy server and that the legacy system mails the customer a ticket. Therefore, according to the Examiner, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify the invention of Iyengar to include printing the ticket at the legacy server so that the ticket is automatic. However, Iyengar does not disclose that the legacy server prints the ticket and furthermore that the legacy server prints the ticket at the time of the selection of the legacy.

g. Applicants have added claim 43 in this amendment as dependent from allowable claim 42. Claim 43 is allowable over Iyengar because Iyengar does not disclose the step of simultaneously printing in the printer at the legacy server, the cost of the ticket providing for the selected one of the legacy and individual transactions as the particular transaction.

h. Claim 33

Claim 33 is dependent from allowable claim 31.

i. Claim 34

Claim 34 is allowable over Iyengar because it is dependent from allowable claim 31. Furthermore, column 6, lines 13-20 in Iyengar does not disclose that the indications of the legacy transactions are provided to the database at the processing station through a wide area network.

j. Claim 35

The Examiner has apparently cited the combination of Iyengar and Gerra against claim 35. Claim 35 is dependent from claim 33 and is accordingly allowable over the combination of Iyengar and Gerra for the same reasons as claim 33. This has been discussed previously in these remarks.

k. Claim 36

Claim 36 is dependent from allowable claim 35. Claim 36 is also allowable over Iyengar for the same reasons as claim 34.

Claim 36 has been rejected under 35 U.S.C. 109(a) as being unpatentable over Iyengar in view of Gerra. Claim 36 is allowable over the combination of references for certain important reasons.

For example, the Examiner has admitted that Iyengar does not disclose prices on the first and second portions of the display screen. The Examiner has cited Gerra in column 2, lines 62-67 and Gerra, column 2, lines 30-40. Column 2, lines 20-30 in Gerra is in the Background of the Invention. Gerra indicates a need rather than an accomplishment. Column 2, lines 62-67 in Gerra is in the Summary of the Invention. It does not indicate that the published prices from the first sources and the published prices from the at least one second source are in incompatible formats and these published prices are displayed in a compatible format. For the reasons specified above, claim 36 is allowable over the combination of Iyengar and Gerra.

5. The Examiner has cited other references than Iyengar against a number of the claims including;

a. Claim 37

Claim 37 has been rejected under 35 U.S.C. (4) as being unpatentable over Iyengar in view of Gardiner patent application 052002/017034. Since claim 37 is dependent from allowable claim 34, claim 37 is allowable over the prior art for the same reasons as claim 34.

The Examiner has admitted that Iyengar does not disclose the steps of providing an accounting application at the legacy server and operating the accounting application at the legacy server to provide an accounting record of the selected one of the legacy and the individual transactions as the particular transaction and to provide an accounting record of the price of the selected one of the transactions. Gardiner also does not disclose this information in paragraphs 0007, 0039, 0045 and 0053. Because of this, claim 37 is allowable over the combination of Iyengar and Gardiner.

b. Claim 38

Claim 38 has been rejected under 35 U.S.C. 103(a) as being unpatentable over Chen pending application US 2002/0152100. Actually, claim 38 has been rejected over a combination of Chen and Altman. (See the last two(2) sentences on page 21 of the Office Action concerning Altman.) Since Altman is not a good prior art reference for the reasons discussed above, Chen 38 is allowable over Chen when only Chen is used as a prior art reference.

Furthermore, contrary to the position of the Examiner, Chen does not disclose in paragraphs 0028 and 0036 the steps of providing legacy transactions and individual transactions and providing a local area network and a printer at the processing

station. Chen also does not disclose in paragraphs 0061-0065 the steps of providing at the processing station a database for storing volatile information including a selected one of the legacy transactions and the individual transactions, and the price of the selected one of the legacy transactions and the individual transactions, as the particular transaction. There is also no disclosure in Chen of the step of providing for the passage through the internet to the printer of the selected one of the legacy transactions and the individual transactions as the particular transaction and the cost of the selected one of the legacy transactions and the individual transactions. There is also no disclosure in paragraph 0032 of Chen of the step of printing at the printer the selected one of the legacy transactions and the individual transaction. According to the Examiner, Chen has admitted that Chen does not disclose the printing of the selected transaction.

For the reasons discussed above, claim 38 is allowable over Chen and the combination of Chen and Pitman.

c. Claim 39

Since claim 39 is dependent from allowable claim 38, it is allowable over Chen, and the combination of Chen and Altman, for the same reasons as claim 38. Altman, in paragraphs 35 and 50-59, and Gerra additionally do not disclose that the legacy transactions, and the price of the legacy transactions, are transmitted to the processing station through a wide area network and that the individual transactions and the price of the individual transactions are transmitted to the processing station through the internet. Altman is also not a proper reference for the reasons discussed above.

d. Claims 40-42

Claims 40-42 have been rejected under 33 U.S.C. 103(a) as being unpatentable over Chen in view of Gerra in view of Altman. Claims 40-42 are allowable over the combination of Chen and Gerra since Altman is not a proper reference for the reasons discussed above.

e. Claim 40

Gerra does not disclose in (a) column 7, lines 1-25 and column 8, lines 4-7 that the legacy transactions are provided in a first protocol, the individual transactions are provided in a second protocol different from the first protocol and the first and second protocols are made compatible at the processing station. Paragraph 0059 in Altman, additionally provides a general discussion that does not disclose what is specifically recited in claim 40. Furthermore, Altman is not a proper reference for the reasons discussed above.

f. Claim 41

Claim 41 is dependent from allowable claim 40.

g. Claim 42

Claim 42 is allowable over the references for the same reasons as claim 40 because it is dependent from allowable claim 40.

6. A number of the claims are allowable over the references because Altman is not a proper reference. The other claims are allowable over the cited references because they recite features not disclosed in the cited references.

Reconsideration and allowance of the application are respectfully requested.

Respectfully submitted,

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Enclosure: (Copy of the Altman provisional application 60/329,281 filed 10/16/2001)



File History Report

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- ☐ The following page(s) _____ of paper number _____ is/are missing from the United States Patent and Trademark Office's original copy of the file history. No additional information is available

Additional comments: **Missing File Wrapper Jacket and Table of Contents**
(60/329,281)



07/16/01
U.S. PTO

PROVISIONAL APPLICATION COVER SHEET

This is the first for filing a PROVISIONAL APPLICATION under 37 CFR 1.53(c).

Docket Number 9570-002-27 PROV

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☒ Additional inventors are named on separately numbered sheets attached hereto.

TITLE OF THE INVENTION (280 CHARACTERS MAX)
GRAPHICAL TRAVEL WIZARD

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ENCLOSED APPLICATION PARTS
Specification Number of Pages: 20 ☒ Other (specify): White Advance Serial Number Card
Drawing(s) Number of Sheets: Fee Transmittal

METHOD OF PAYMENT
☒ Applicant claims small entity status.
☒ A check or money order is enclosed to cover the Provisional Filing Fees
☐ The Commissioner is hereby authorized to charge filing fees and credit any overpayment to Deposit Account Number 50-1442

PROVISIONAL FILING FEE AMOUNT \$80.00

The invention was made by an agency of the United States Government or under a contract with an agency of the United States Government.

- ☒ No.
☐ Yes, the name of the U.S. Government agency and the Government contract number are:

10/16/01
DATE

Respectfully submitted,

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PROVISIONAL APPLICATION FILING ONLY



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Docket Number 9570-002-27 PROV

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DOCKET NO: 9570-002-27 PROV

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Graphical City Selection for Online Reservation Booking

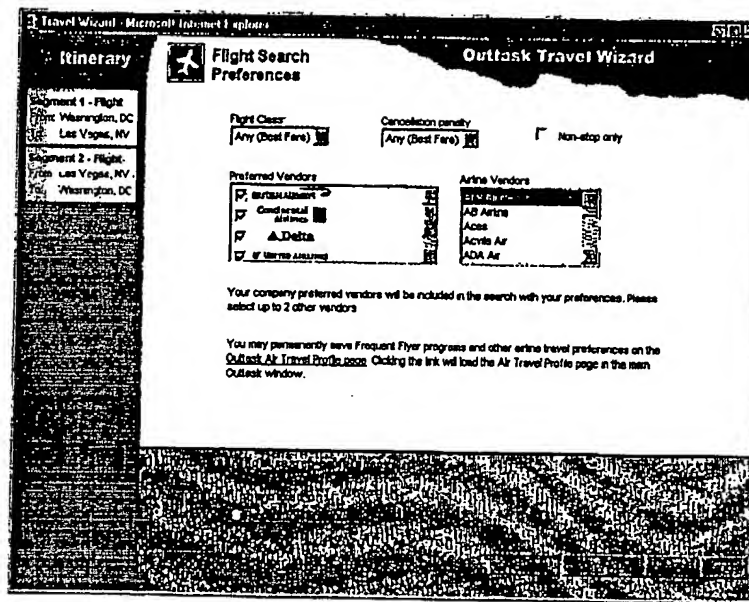
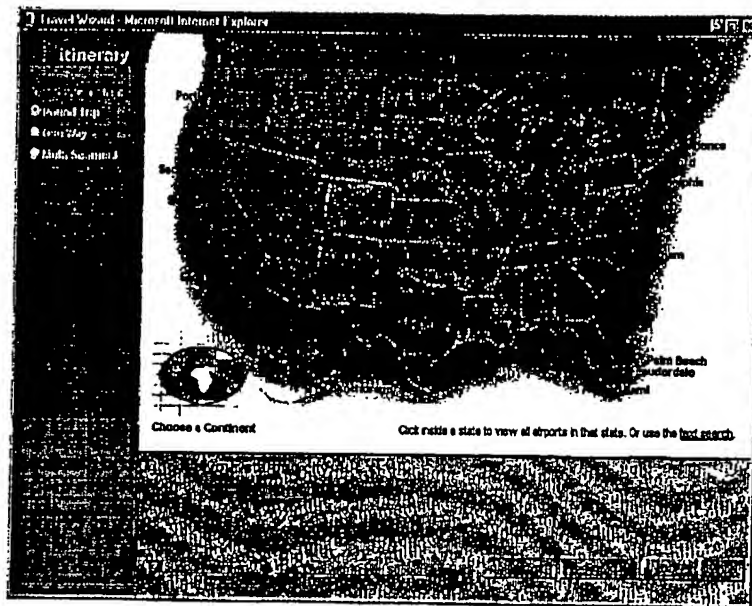
Selection of cities from a map used as input into a GDS (aka, online reservation system) for the retrieval of actual Flight Schedules/Fares, Hotel Availability/Rates, Car Availability/Rates, Reserving, and Booking a trip. This allows the system to accept the travel cities, and uses that data to run a real-time query against the GDS to retrieve Air/Hotel/Car availability, and once the user has made a selection, a reservation will be created.

Unique features:

- o Traveler selects cities – not airports – the Outtask system looks up the correct airport or region code to supply to the GDS. This makes travel planning easier, eliminates errors, and allows Outtask to extend the availability search to include all airports in a region.
- o Smart defaulting of personal and corporate preferred airports. This allows a company to specify that a particular HOME airport always be included in the search – in a multi-airport city this can force unpopular but cost effective departure airports to be included.
- o Smart defaulting of personal and corporate preferred airlines/hotels/cars. This allows a company to specify that a particular carrier will always be included in the search – this feature is particularly useful for companies that have volume contracts with a particular carrier. Combined with our preferred carrier rules enforcement it will allow a company to enforce strict control over employee travel on non-preferred carriers.

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Incorporation of Government PerDiem Data Into Travel Rules Enforcement

This is provided under the rules policy enforcement in the Outtask Travel system. It will either warn the user of an infraction, or require approval before the booking can proceed. This feature works as follows for hotel rates:

- US Government per-diem rates are electronically loaded into Outtask
- PerDiem users are informed when they attempt to reserve a hotel that exceeds the PerDiem rate for that locality
- When the PerDiem policy is in effect one of the following happen when a hotel rate exceeds the amount for that location.
 - Warning -- The user will be required to enter a reason for the out of policy reservation, the user's manager will be informed, and the booking will proceed.
 - Approval Required -- The user will be required to enter a reason for the out of policy reservation, the reservation will be cancelled unless the user's manager approves the request.

Travel Wizard Microsoft Internet Explorer

Itinerary Hotel Search Preferences Outtask Travel Wizard

Location: BUCKHEAD

First Hotel: [] when: [] P to: [] miles: []

Check-in date: 10/05/2001 Check-out date: 10/08/2001

Change Month

OCTOBER 2001							NOVEMBER 2001						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6		1	2	3	4	5	6	7
7	8	9	10	11	12	13	8	9	10	11	12	13	14
14	15	16	17	18	19	20	15	16	17	18	19	20	21
21	22	23	24	25	26	27	22	23	24	25	26	27	28
28	29	30	31				29	30	31				

Select a Day

Smoking Preference: Non-smoking Room Type: King Number of Guests: 1

Preferred Vendors: [] Hotel Vendors: []

Your company preferred vendors will be included in the search with your preferences. Please select up to 5 other vendors.

Preferred Amenities:

☐ a gym ☐ a pool

☒ a restaurant ☐ room service

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Travel Wizard Microsoft Internet Explorer

Itinerary

C \$169.00 Special Fall Package * Deluxe Room * 1 King Or 2 Dble Includes Buffet For 2 In Lobby Lounge And
valet Parking

C \$179.00 Weekend Rate * Deluxe Room * 1 King Or 2 Doubles

C \$195.00 Weekend Rate * Deluxe Room * 1 King Or 2 Dble *

C \$220.00 Corporate Rate * Deluxe Room * 1 King Or 2 Doubles

C \$249.00 Aaa Rate * Deluxe room * 1 King Or 2 Dble Must Be A Member Of Aaa

C \$295.00 Ritz-carlton Club * 1 King Or 2 Doubles * 5 Food And Beverage Presentations

C \$315.00 Ritz-carlton Club * 1 King Or 2 Dble * 300 Sq Ft * Private Floor 5 Food And Bev Presentations
daily*exclusive Check In CheckOut

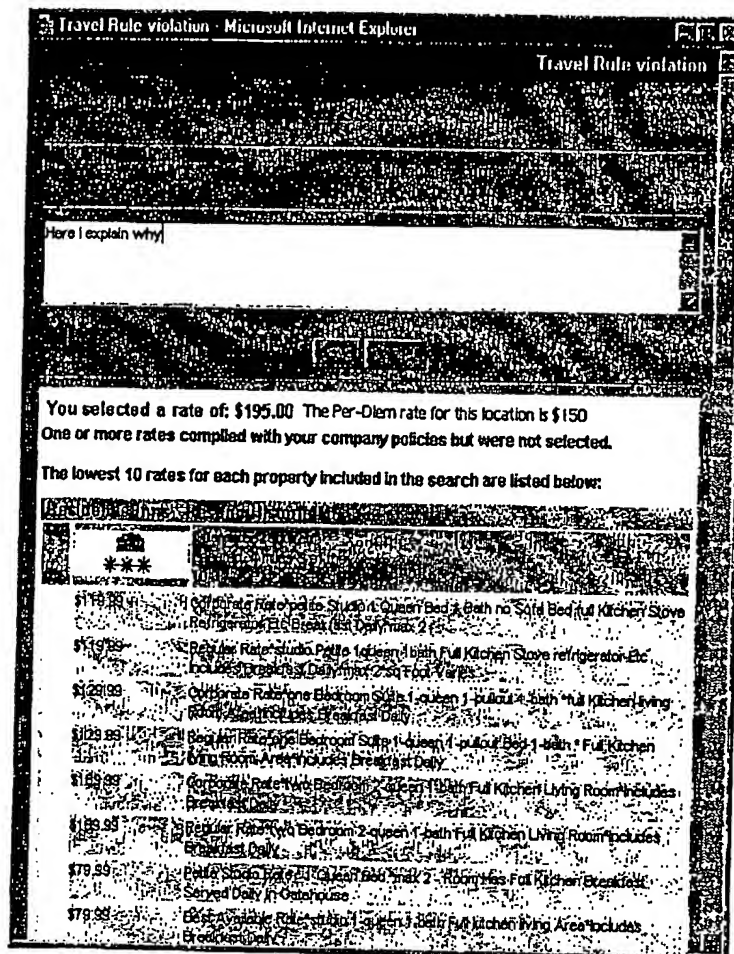
C \$329.00 Bed And Breakfast Pkg * Executive Suite * 1 King * Parlor/ Bedroom * Includes Cont Breakfast For 2
In Cafe And Parking

C \$425.00 Executive Suite * 1 King * Separate Parlor/Bedroom * 730 Sq Ft Must Call Hotel To Confirm A Two
Bedroom Suite

C \$495.00 Ritz-carlton Club Executive Suite * 1 Bedroom * 730 Sq Ft Private Floor * 5 Food And Beverage
Presentations Daily

C \$640.00 Buckhead Suite * 1 King * 1025 Sq Ft * Connector Available Can Be Booked With Club Access For
100 More Per Night

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Enforcement of Travel Policy during Booking

Designation and enforcement of corporate travel policy when the user is in the booking process – as the user Selects a Flight, Hotel, or Car that is disallowed under company policy 1) the user is notified, and 2) it will not be allowed to go to ticketing until approval. In existing systems, travel rules enforcement occurs after the employee has performed the booking by the Travel agent – Outtask's system is much improved over these systems– it alerts the employee at the time of the rule infraction and presents acceptable alternatives to avert out of policy travel.

Unique features:

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- On a per rule basis, the employee's manager can be notified and the ticketing allowed to continue, or ticketing will be blocked until the manager approves the trip itinerary.
- When a user chooses a flight/car/hotel that is more expensive than a travel rule allows, a message will be generated for manager notification/approval that will include the lower cost options that the traveler decided not to take, and a message from the employee explaining the reason. This information will be included in both an email message to the manager, and the system log.
- Green / Yellow / Red coding of Air Fare, Car Rates and Hotel Rates indicating – Within Company Policy, Allowable but Requires Manager Notification, and Out of company policy – will require approval prior to ticketing.
- All rules are computed based on the NET ticket price; this includes both the Front-end and Backend ticket prices.
- Configurable rules for Air/Hotel/Car in the following form:
 - Approval/Notification if rate is \$X above the best fare found
 - Approval/Notification if rate exceeds \$X maximum allowable by company policy
 - Approval/Notification for airfare/car/hotel on non-preferred carrier
 - Approval/Notification for airfare/rate on non-preferred carrier where preferred carrier is within \$X of the non-preferred fare
 - Approval/notification on a non-preferred carrier between 2 cities

TravelWorx - Microsoft Internet Explorer

Itinerary

Segment 1 - Flight
From: Washington, DC
To: Las Vegas, NV

Segment 2 - Flight
From: Las Vegas, NV
To: Washington, DC

Select Price

Outbound Flight

Carrier	Flight	Depart From	On	Arrive	At	Price
Delta	231	Washington	10/25/2001	Salt Lake City Int	10/25/2001	730
		Dulles Int (AD)	7:30 AM	Arpt (SLC)		10:07 AM
Delta	1405	Salt Lake City Int	10/25/2001	McCarran Int	10/25/2001	783
		Arpt (SLC)	11:35 AM	(LAS)		12:00 PM

Return Flight

Carrier	Flight	Depart From	On	Arrive	At	Price
Delta	790	McCarran Int	10/27/2001	Orlando Intl	10/27/2001	757
		(LAS)	3:10 PM	Kentucky Int Arpt		9:54 PM
Delta	5788	Orlando Intl	10/27/2001	Washington	10/28/2001	CRJ
		Kentucky Int Arpt	11:00 PM	Dulles Int (AD)		12:25 AM
		(CVO)				

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Travel Rule violation - Microsoft Internet Explorer

Travel Rule violation

Here is where I enter my reason for out of policy travel

You selected a fare of: \$430.50

The following rules-compliant options were presented but not chosen:

Cost: \$280.50					
Outbound Flight					
▲Delta	1425	Washington Dulles Intl (IAD)	10/25/2001 5:50 AM	Hartsfield Intl Arpt (ATL)	10/25/2001 M80 7:37 AM
▲Delta	749	Hartsfield Intl Arpt (ATL)	10/25/2001 8:35 AM	McCarran Intl (LAS)	10/25/2001 783 10:00 AM
Return Flight					
▲Delta	1196	McCarran Intl (LAS)	10/27/2001 3:35 PM	Hartsfield Intl Arpt (ATL)	10/27/2001 757 10:27 PM
▲Delta	2297	Hartsfield Intl Arpt (ATL)	10/27/2001 11:40 PM	Baltimore Washington Intl Arpt (BWI)	10/28/2001 757 1:21 AM

Cost: \$350.00					
Outbound Flight					
▲Delta	1425	Washington Dulles Intl (IAD)	10/25/2001 5:50 AM	Hartsfield Intl Arpt (ATL)	10/25/2001 M80 7:37 AM
▲Delta	749	Hartsfield Intl Arpt (ATL)	10/25/2001 8:35 AM	McCarran Intl (LAS)	10/25/2001 763 10:00 AM
Return Flight					

109701-10262509

Request ID	From	To	Status	Request Date	Approval Date
109701-10262509	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262510	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262511	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262512	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262513	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262514	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262515	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262516	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262517	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262518	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262519	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262520	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262521	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262522	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262523	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262524	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262525	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262526	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262527	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262528	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002
109701-10262529	San Francisco, CA	Los Angeles, CA	Approved	03/03/2002	03/03/2002
109701-10262530	Los Angeles, CA	San Francisco, CA	Approved	03/03/2002	03/03/2002

Incorporation of Carrier Direct fares with Data from GDS/CRS

This feature of the Outtask online travel system allows outtask to offer customers fares from both a GDS (Global Distribution System) and Internet Direct fares. Merged into a single user interface for fare selection.

Key aspects of this integration

- Combining GDS data with Internet direct fares provides user a single place to comparison shop the entire internet
- Internet Direct fares are filtered based on customer travel policy – this allows only showing internet direct fares that are a substantial savings
- User is notified as to the policy compliance of any fare at the time of purchase regardless of its source (GDS or Internet).
- The system performs buy tracking to capture internet bookings and integrate this data back into the Travel Reporting system.

Key Technical Aspects

- Combined presentation of fares from multiple providers

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In Browser Support from Travel Agent in Online Booking

This feature allows the user of the Outtask Online booking system to contact a travel agent or customer support engineer for help with Online booking. Using this system, the user can contact a Travel Agent or CSR in the following ways:

- Voice Over IP Phone conversation
- Shared Browsing session
- The Voice over IP support allows a user to click on a link, and talk to a Travel agent for immediate support during the booking process. This allows a Traveler to make reservations w/o requiring an agent to be involved, but provides the utility of an immediately available. If the traveler has progressed to the point of having a reservation in the system the travel agent is able to retrieve the reservation for review or modification while the customer is online.
- Shared browsing support allows a user to enter an interactive chat dialog with a CSR while the user is in the process of booking. This facility allows a CSR to push screens to the user to assist in the booking process.

Integration of Multiple Travel Data sources into an Expense Management system

The Outtask Expense Management system, Vin.Net, integrates Credit Card data feeds of charge information into the Expense Report creation process.

These features of the system do the following:

- Incorporate Post Booking information into the Expense Management System combined with other data sources to form an expense record.
- Manage the "Receipt" data electronically, freeing up the requirement of remitting paper receipts to support paperless expense management.
- Allow the wireless entry of travelers expenses into staging area for expense reporting

Post Booking Information

The incorporation of Post-Booking information into the Expense Management System allows all data that presented in a Travelers Itinerary to be incorporated into an expense report. The key technology issue is the ability to tie a data record to the appropriate user. Once completed, the post booking data is used to complete an expense record. This record includes the following information: Travel Dates, vendor, amount, departure/arrival, carrier, taxes, and record specific information such as ticket number. Other available data sources MAY be correlated to this record to add to the data record. For instance, a Post Ticketing rental car expense record will contain travel days, and vendor information, but not final cost. This system will correlate the

post ticketing record with a credit card charge record, and complete the rental car expense record.

Electronic Receipt Management – Paper less expense reporting

This feature alleviates the user from having to turn in receipts for items that can be captured and tracked electronically. This feature combined with user authentication at submission time to verify the identity of the user submitting the expense will enable paper-less expense report management. The "electronic" record of the expense item is maintained in an un-alterable form associated with the expense. When the company needs to review the receipt, it is accessed via a web browser.

Wireless Device Expense Collection

A user can enter a record of an expense from a Wireless device. This record will be available for use the next time a user completes an expense report. The following information is transmitted; Expense Type, Amount, Date, Project, and a comment. Once stored as an expense record the user simply clicks the expense into the expense report. This feature should be distinguished from that of filling out an expense report using a wireless device, and submitting it. We believe that this is a much more user friendly approach to capturing the expense at the time it occurs, and then incorporating it into an expense report when a user has access to a computer.

Audit system for EFT payments from a Expense Management System

In the T&E system we manage electronic funds transfer payments for many of our customers. We process millions of dollars a day in funds payments. The sheer volume of the transfers is so large that there is no economical way to manually audit the transfers to see whether any defects in the system led to problems with the files. Malfunctions in the payment subsystem are costly as once the payment is made and the money transferred it is difficult to undo any errors. Additionally there is no economical way to manually detect whether there is anything out of the ordinary with the files of one of our customers that would indicate that they made errors when releasing reports or if someone managed to find a way within the system to get a large report approved that should not have been.

With this invention we analyze the transfer amounts themselves statistically to see whether they fall outside the norms of the transfers for that company. We also analyze the individual expense reports that are being paid to see if the report was not approved when typically that traveler's reports require approval. We check the total amount paid to each traveler to see if any traveler's reimbursement total is above a threshold. We also check the age of the report to see if it was in the past far enough that it was possibly already paid. This way we can investigate to prevent accidental double-payment due to system malfunction.

The audit system generates reports in HTML format daily. These reports are sent to appropriate administrators for review and can optionally be sent to Outtask customers.

The parameters for the audit system can be configured on a company by company basis.

The audit report is generated after the EFT files are generated and before they are transmitted (the transmission is manual for security reasons). Our staff has the ability to act on any issues raised by the audit report prior to sending the files. This audit system has allowed us to be proactive and contact customers with suspected issues before their administrators have discovered them.

The architecture of the auditing system has an extensible architecture to support customer specific business process audit rules. The business rule has to be expressible in terms of on data elements contained in the EFT, previous reports from that company, or the previous transfers from that company.

Audit Example:

10/02/2001: Results of running audit procedures:

Cash

142423.29

Total batch payment is higher than average

Cash

52507

10848.14

Total payments for this employee exceeds 10000

Cash

032033

20330912nhe4734

599.48

Report was automatically approved

Cash

60329284.101601

445831.41
Total batch payment is higher than average

Cash
34004
40040822dvl0048
117.3
Report was automatically approved

60329281.104601

CC
102034
20340927kvi3439
469.78
Report was automatically approved

Cash

6999.86
Total batch payment is higher than average

60326281-101601

Cash

241824.57

Total batch payment is higher than average

Cash

4425.26

Total batch payment is higher than average

Cash

9439.99

Total batch payment is higher than average

60329281.101601

10/02/2001: VinPayer did not create any payments for following customers:

CID	Outtask ID	Run Type	Time
AX06060P	213	CASH-PRENOTE-BILLING-CC	01:21:31 (9s)
CBT60604	193	CASH-PRENOTE-BILLING-CC	01:07:30 (3s)
CEB20006	276	CASH-PRENOTE-BILLING	01:27:58 (4s)
CPCFS601	210	CASH-PRENOTE-BILLING-CC	01:18:46 (2s)
DIV24122	55	CASH-PRENOTE	01:01:19 (2s)
OCF25301	216	CASH-PRENOTE-BILLING-CC	01:21:55 (19s)
OCF2530C	215	CASH-PRENOTE-BILLING-CC	01:21:36 (5s)
OUT22203	1	CASH-PRENOTE	01:01:03 (2s)
RAG80112	194	CASH-PRENOTE-BILLING-CC	01:07:33 (3s)
REM10019	208	CASH-PRENOTE-BILLING-CC	01:17:32 (8s)
RSP31522	191	CASH-PRENOTE-BILLING-CC	01:07:21 (4s)
SVG93007	185	CASH-PRENOTE-BILLING	01:05:49 (8s)
TARL0203	232	CASH-PRENOTE-BILLING-CC	01:27:48 (4s)
TJA02038	192	CASH-PRENOTE-BILLING-CC	01:07:27 (6s)
VAL53511	202	CASH-PRENOTE-BILLING-CC	01:14:00 (8s)
WCI15220	190	CASH-PRENOTE-BILLING-CC	01:07:17 (14s)

10/02/2001: VinPayer created payment files for following customers:

Bank: MBA(US)
CC:MASTER CARD
Run:CASH-PRENOTE-BILLING

ACH file: 10020118.MBA

Batches/Details
Debits
Credits

1/97
0.00
142423.29

Cash:

0/0

Prenote:

0/0

Billing:

50329281.101604

0/0	CC:
1/97	Total:
0.00	
142423.29	
Bank: BOD(US)	
CC:None	
Run:CASH-PRENOTE-BILLING	
ACH file: 10020126.BOD	
Batches/Details	
Debits	
Credits	
1/6	Cash:
0.00	
2053.81	
1/1	Prenote:
0/0	Billing:
0/0	CC:
2/7	Total:
0.00	
2053.81	

Business Workflow for Requests and Approvals

The invention is an object-oriented workflow framework designed to unify user requests across a heterogeneous environment. The end users see a single "Request Queue" tracking requests they have made, and a single "Approval" queue for requests from others that they must act upon even though the physical requests may reside on different systems. The intellectual property here is an object-oriented framework

which is data independent that manages each of the requests through several stages, enforcing rules or other business logic.

The idea of the single request and approval queue is not new to the Outtask system. From the perspective of the end user this functionality has been in the product since our initial release back in late 1999. However that initial system was built specifically to handle manually inserted travel requests (not requests taken from a CRS feed), and while we had hoped that it would be easily extended to handle requests from other products it turned out not to be so. We began a redesign of the system from the ground up in June of 2000. Over the next several months we deployed a partial instance of the invention that could handle HR requests in addition to the manually-inserted travel requests, but now we are preparing to roll out the final version which has been updated to read data from a CRS system and has automatic rules enforcement built into it. These last two pieces are key intellectual property for us as they represent how we have been able to integrate multiple CRS feeds into the Outtask system.

This feature provides an object-oriented framework for workflow that exposed a single API for creating, promoting, rejecting, and fulfilling any request that a user could make. The framework is data independent so that the physical requests can lie in different systems without any changes being made to the framework. We have also added object-oriented rules enforcement logic to this framework. The nature of this framework is such that we can add or integrate other products into the Outtask framework quickly and easily. All we need to do is build the data access layer and then our O-O framework takes over from there. Our developers can manipulate any type of request, be it a HR Leave request, a Travel request, or a request for an order of office supplies with the same high-level code.

The workflow supported by the framework is as follows:

- 1) Zero or more "preprocessing" steps. Preprocessing steps are those required before the request would need to be approved.
- 2) Zero or more "approval" steps, where a person (typically a manager) approves the request
- 3) Zero or more "processing" steps. Processing steps are those required after approval but before the request can be fulfilled
- 4) One or more "fulfillment" steps, where the request is actually fulfilled.

Additionally a request can be rejected during the preprocessing, approval, and processing steps, and can be withdrawn by the requestor any time prior to fulfillment.

Some examples of this workflow: [NB: We have to decide whether the rules enforcement is part of preprocessing... after writing this I think it may be but we could enforce rules wherever we wanted -Fred].

Travel. In the preprocessing steps the traveler goes online or calls a travel agent and makes a reservation in the system. The automated rules system receives the reservation from the CRS and determines whether this specific request requires approval (and if so by whom) or if the request meets policy guidelines. If the request requires approval it is routed to one or more people or alternatively one or more queues where groups of people can approve the request before it proceeds to

processing and fulfillment. If the request does not require approval it proceeds straight to processing and fulfillment. During the processing phase the agent confirms the reservation and the credit card is charged. If the credit card charge is accepted by the credit card company the request is fulfilled by the issuing of the ticket.

Human Resources Leave Request. After the request has been entered, there is no preprocessing required. The automated rules system examines the request and company policy to determine whether this specific request requires approval (and if so by whom). If the request is approved, or if the request did not require approval, then the request proceeds to fulfillment, where the employee's leave bank is decremented by the amount of the request.

In either case, had the approver rejected the request it would have been sent back to the requestor who would have had the opportunity to comment further on the request and resubmit it, or withdraw the request. In the travel case, the travel agent could reject the request during processing if the reservation made during the preprocessing phase had expired and no equivalent reservation could be made. The agent could also have rejected during preprocessing if no reservation could be made that met the traveler's criteria and company policies.

Booking Management Process

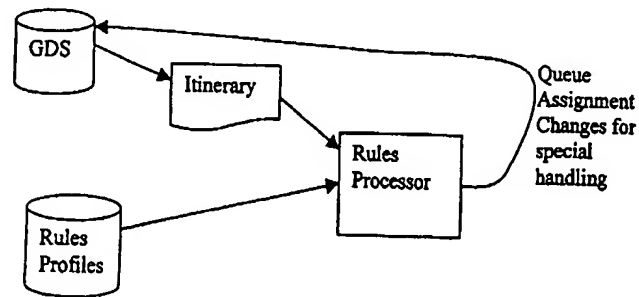
This system employs a set of configurable rules/business processes that allow agents to segregate travel requests booked through the Outtask Travel System based on priority/importance on a set of factors. Based on the segregation, special attention can be paid to certain types of requests. The a sample of the rules used to classify reservations for special handling include the following configurable factors:

- Travelers marked as VIP by the travel agency (e.g. CEO/COO, tvl. mgr. etc): high priority handling. Routed to special queues in the GDS for personal care
- Trips with expensive tickets that meet certain reqm'ts (e.g. Saturday night stay): high priority handling. Tickets like this can be ideal candidates for agents to seek fee waiver requests. If I have a \$2000 ticket I'm buying 4 days before I leave, and it has a Saturday night stay, it might be worthwhile for the agent to get me a 3-week advance waiver, dropping the ticket to \$800 + (let's say) a \$400 fee charged by the agent. Saves the traveler's company \$800, makes us \$400.
- Tickets for travel in next N days: agents are much more aggressive on getting these issued, let's say. .
- Travelers taking trips on airlines on which they have status: high priority handling. If a United 100,000 traveler has a trip on United, that trip is queued for priority handling regarding upgrades/waivers/whatever.
- Fare expiration rules: trips can be evaluated for how soon until the fare expires, and routed/re-routed based on that information. In other words, a fare good for another 10 days can go on a low priority queue. If it's still sitting

there 7 days later (which it probably shouldn't be), it gets bumped to a higher priority queue.

This system has the following primary components:

- Passenger profile data store – for managing passenger attributes used in the classification – this is independent of the user's travel preferences etc – this is where special attribution is added by a travel agent to designate VIP status etc.
- Rules driven system to extract trip data from the GDS, evaluate rules to classify and re-assign itineraries to special GSD Queues for appropriate handling.
- Web based interface for agency for classification rules and profile management.



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		Inventor(s)	Jonathan ALTMAN, et al.																																												
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